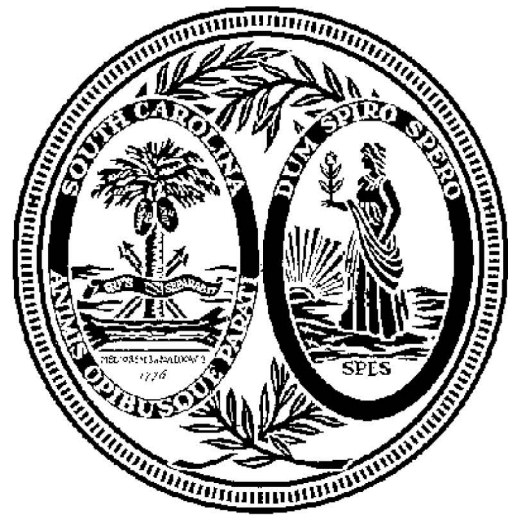


Clarendon County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information

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EXECUTIVE SUMMARY

Population

Clarendon County's population growth has been slower than the state's in recent years.

Future growth is expected to be slower as well.

Not quite half of Clarendon County's workers live within the county.

Over 15% of Clarendon County's workers come from Sumter County.

Income

Per capita income growth has been faster than the state but slower than the nation.

Clarendon County's per capita income was below state and national levels from 1996 to 2006.

Clarendon County's average wages are higher than the state's for these occupation groups: community and social services; legal; arts, design, entertainment, sports and media; and protective service.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the area of business management.

Occupations

Almost all occupational groups are expected to have faster growth in Clarendon County than in the state.

Requirements for Clarendon County's workers are expected to grow in the following levels of education and experience:

Moderate-term on-the-job training, work experience in a related field, and associate's degree.

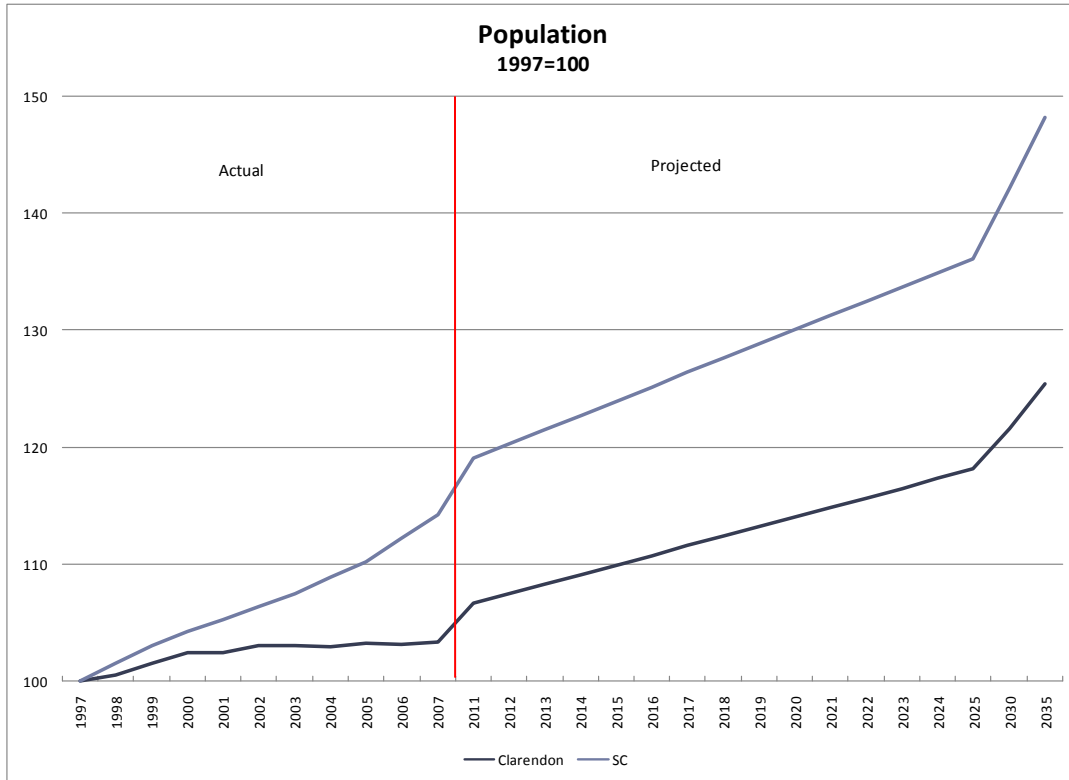
Industry

Based on available data, a sector rated as having high potential in Clarendon County is truck transportation.

POPULATION

Growth

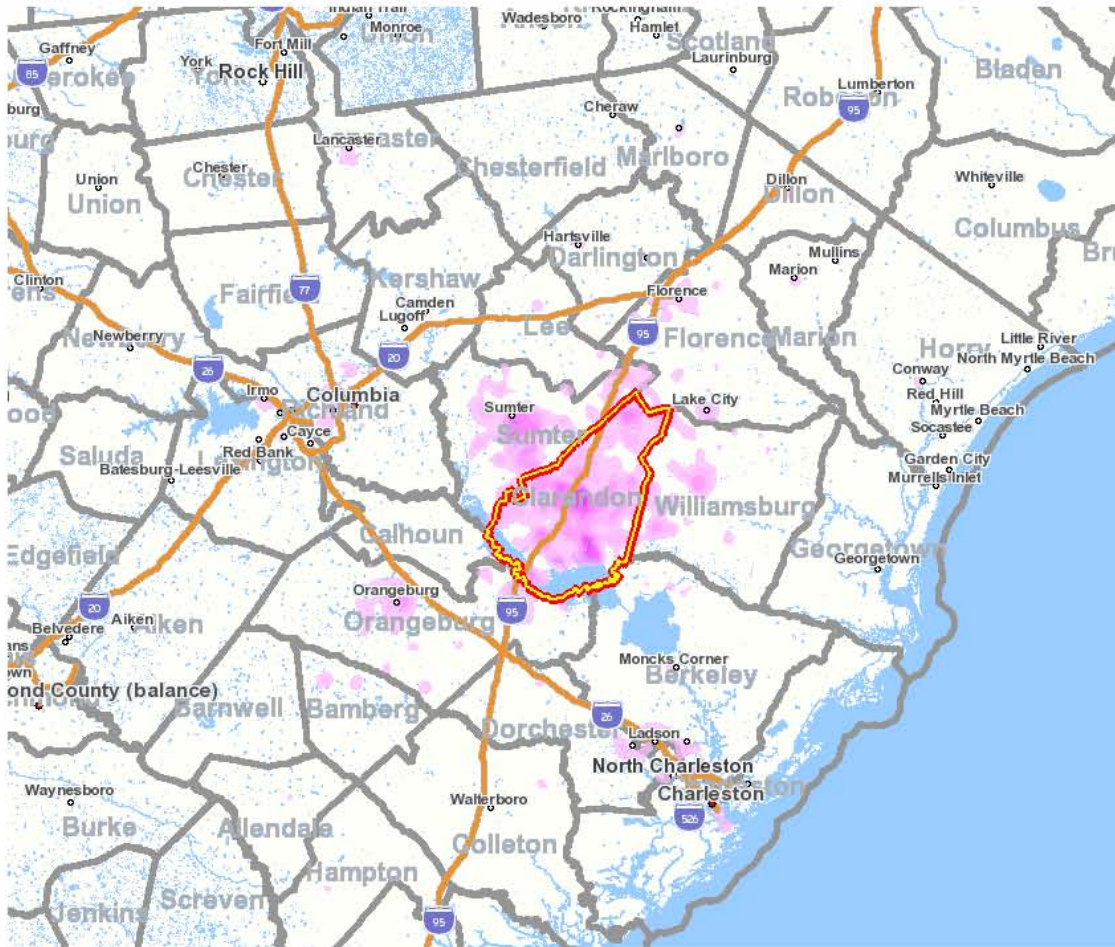
Clarendon County's 2007 population was 32,822. The county population has grown by 3.4% since 1997, compared to 14.2% for South Carolina. Clarendon's future population growth is expected to be slower than the state's.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Clarendon County workers come from (in 2006, latest available data). As can be seen, Clarendon County draws workers mainly from nearby areas.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

Age of Workers:

30 or younger	24.1%
31 to 54	57.8%
55 or older	18.1%

Earnings of Workers:

\$1,200 per month or less	35.4%
\$1,201 to \$3,400 per month	47.5%
More than \$3,400 per month	17.1%

States Where Workers Live:

South Carolina	98.6%
North Carolina	0.9%
All other locations	0.5%

Counties Where Workers Live:

Clarendon, SC	47.1%
Sumter, SC	16.1%
Orangeburg, SC	6.9%
Williamsburg, SC	6.3%
Florence, SC	3.6%
Berkeley, SC	2.3%
Richland, SC	1.8%
Dorchester, SC	1.7%
Lexington, SC	1.4%
Charleston, SC	1.1%
All Other Locations	11.6%

Cities Where Workers Live:

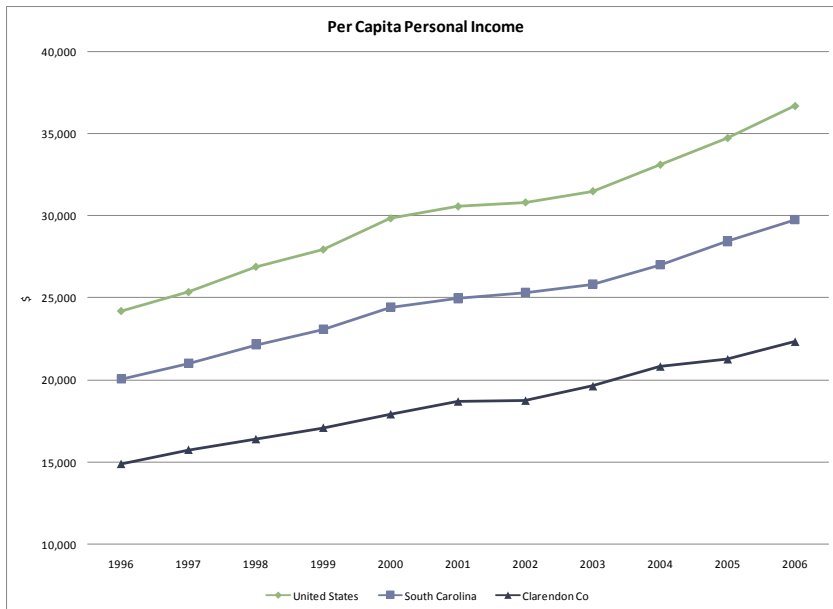
Manning, SC	9.8%
Sumter, SC	5.0%
Lakewood, SC	0.9%
Summerton, SC	0.9%
Orangeburg, SC	0.9%
Kingstree, SC	0.7%
Turbeville, SC	0.7%
Florence, SC	0.7%
Privateer, SC	0.6%
Summerville, SC	0.5%
All Other Locations	79.4%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

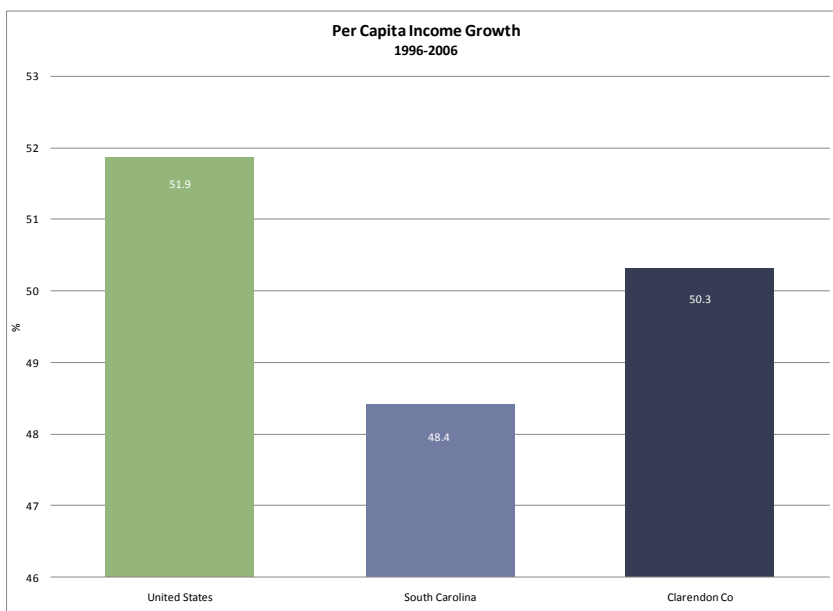
Per Capita Income

Clarendon County's per capita income has consistently been below state and national levels.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Clarendon County's per capita income has grown faster than South Carolina's but not as fast as the nation's. As a result, Clarendon County lags farther behind the U.S. in this key measure of economic vitality.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Clarendon County's average wages are well below those of South Carolina (\$502 vs. \$680 in 2007).

Average wages were up 17% in Clarendon County over the past five years, compared to 18% for the state.

All major sectors had growth except for finance and insurance.

Industry	NAICS Code	2007 Average Weekly Wage (\$)	2002 Average Weekly Wage (\$)	% Change
Total, Private and Government		502	430	17
Construction	23	480	405	19
Manufacturing	31-33	641	550	17
Retail Trade	44-45	369	317	16
Transportation and Warehousing	48-49	629	508	24
Information	51	544	377	44
Finance and Insurance	52	546	568	-4
Real Estate and Rental and Leasing	53	333	268	24
Administration and Support and Waste Management and Remediation Services	56	345	307	12
Arts, Entertainment and Recreation	71	260	246	6
Accommodation and Food Services	72	194	165	18
Other Services (Except Public Administration)	81	386	321	20
Federal Government		839	665	26
State Government		626	559	12
Local Government		612	474	29

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Clarendon County are higher than the state average in the following occupational groups:

- Community and social services
- Legal
- Arts, design, entertainment, sports and media
- Protective service

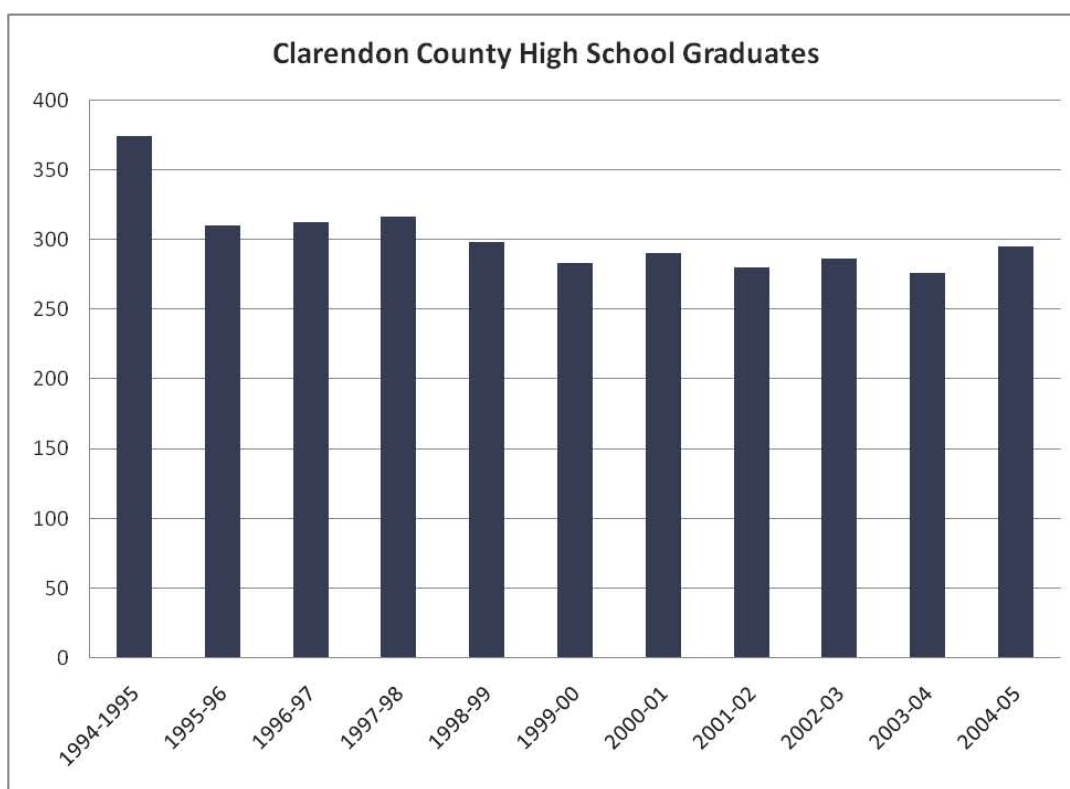
Occupation	2007 Clarendon County Median Hourly Wage (\$)	2007 SC Median Hourly Wage (\$)
Management occupations	16.65	28.78
Business and financial operations occupations	13.15	20.28
Computer and mathematical science occupations	19.99	26.20
Architecture and engineering occupations	19.99	30.22
Life, physical and social science occupations	16.99	22.76
Community and social services occupations	13.20	13.18
Legal occupations	38.83	30.68
Education, training and library occupations	21.53	24.42
Arts, design, entertainment, sports and media occupations	14.01	12.66
Healthcare practitioners and technical occupations	24.02	30.64
Healthcare support occupations	7.52	10.55
Protective service occupations	14.28	13.87
Food preparation and serving related occupations	6.96	7.90
Building and grounds cleaning and maintenance occupations	6.74	8.42
Personal care and service occupations	7.72	8.39
Sales and related occupations	9.55	13.48
Office and administrative support occupations	11.34	13.22
Farming, fishing, and forestry occupations	11.84	13.07
Construction and extraction occupations	14.58	16.51
Installation, maintenance and repair occupations	13.49	16.88
Production occupations	13.83	15.21
Transportation and material moving occupations	10.34	12.94

Source: *Economic Modeling Specialists, Inc.*

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Clarendon County students receiving high school diplomas fell by 79 (21%). In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 295 people received high school diplomas in Clarendon County in 2005. Clarendon County had 31 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of Clarendon County students not passing the exit exam who received a certificate of completion instead of a diploma increased by 40 (to 57) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 1,300 more students graduated from higher educational institutions in the Santee-Lynches area in 2006 than in 1996, an increase of 13%. The greatest numerical increase was in business management fields.

Program	1996	2006	Change	% Change
Agriculture, agriculture operations & related sciences	16	4	-12	-75
Area, ethnic, cultural & gender studies	19	26	7	37
Biological & biomedical sciences	434	458	24	6
Business, management, marketing & related support services	1,685	2,173	488	29
Communication, journalism & related programs	353	428	75	21
Computer & information sciences & support services	181	239	58	32
Construction trades	1	3	2	200
Education	1,262	1,205	-57	-5
Engineering technologies/technicians	123	160	37	30
Engineering	289	315	26	9
English language & literature/letters	310	276	-34	-11
Family & consumer sciences/human sciences	117	246	129	110
Foreign languages, literatures & linguistics	81	71	-10	-12
Health professions & related clinical sciences	1,236	1,330	94	8
Legal professions & studies	324	324	0	0
Liberal arts & sciences, general studies & humanities	672	391	-281	-42
Library science	185	200	15	8
Mathematics and statistics	129	99	-30	-23
Mechanic and repair technologies/technicians	106	248	142	134
Multi/interdisciplinary studies	37	86	49	132
Natural resources & conservation	15	3	-12	-80
Parks, recreation, leisure & fitness studies	125	240	115	92
Personal & culinary services	2	38	36	1,800
Philosophy & religious studies	30	52	22	73
Physical sciences	167	162	-5	-3
Precision production	89	99	10	11
Psychology	353	445	92	26
Public administration & social service professions	325	365	40	12
Security & protective services	359	343	-16	-4
Social sciences & history	719	823	104	14
Theology & religious vocations	284	338	54	19
Visual & performing arts	195	339	144	74
TOTAL	10,223	11,529	1,306	13

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Allen University, Benedict College, Central Carolina Technical College, Claflin University, Coker College, Columbia College, Columbia International University, Florence-Darlington Technical College, Francis Marion University, Lutheran Theological Seminary, McLeod Regional Medical Center School of Medical Technology, Morris College, Northeastern Technical College, Orangeburg-Calhoun Technical College, South Carolina State University, South University, Southern Methodist College, University of South Carolina-Columbia, University of South Carolina-Lancaster, University of South Carolina-Sumter, Williamsburg Technical College.

OCCUPATIONS

Occupational Projections

Almost all occupational groups are projected to grow faster in Clarendon County than in the state.

See **Appendix A** for detailed occupational information.

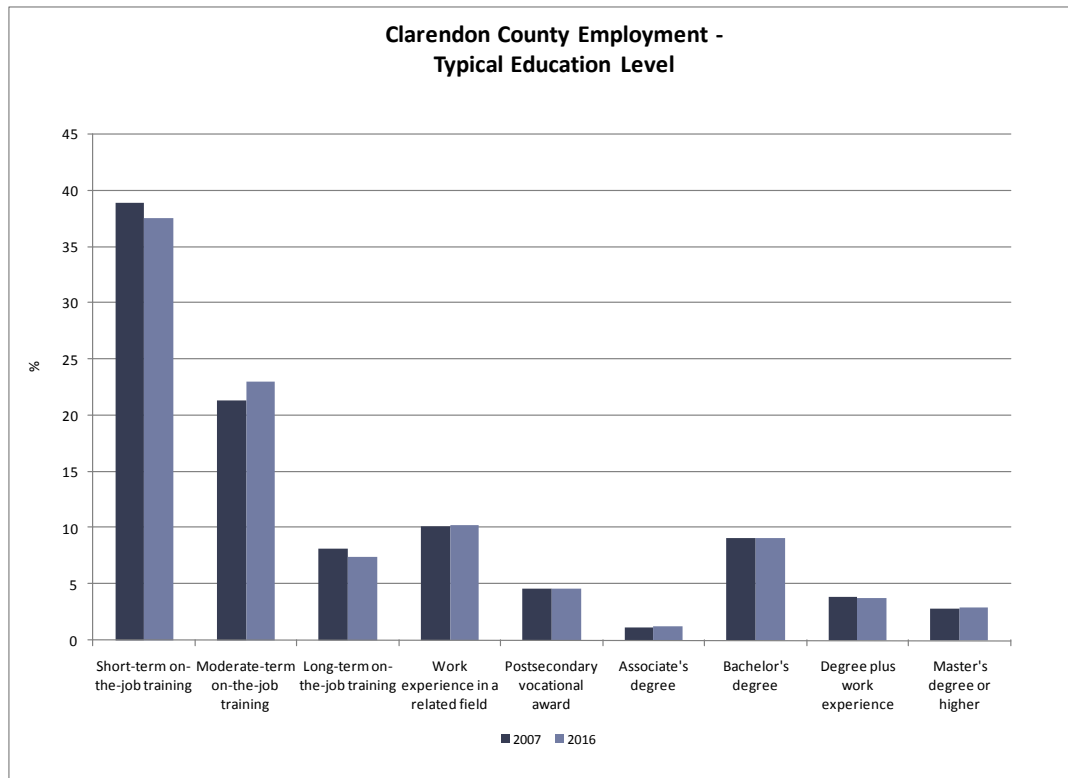
Occupation	2007-2016 Clarendon County Projected Growth (%)	2007-2016 SC Projected Growth (%)
Management occupations	17	17
Business and financial operations occupations	37	22
Computer and mathematical science occupations	26	23
Architecture and engineering occupations	42	15
Life, physical and social science occupations	34	15
Community and social services occupations	30	15
Legal occupations	22	21
Education, training and library occupations	22	16
Arts, design, entertainment, sports and media occupations	20	17
Healthcare practitioners and technical occupations	37	24
Healthcare support occupations	51	25
Protective service occupations	29	18
Food preparation and serving related occupations	11	13
Building and grounds cleaning and maintenance occupations	31	23
Personal care and service occupations	27	7
Sales and related occupations	17	19
Office and administrative support occupations	22	13
Farming, fishing and forestry occupations	24	16
Construction and extraction occupations	34	19
Installation, maintenance and repair occupations	28	17
Production occupations	56	10
Transportation and material moving occupations	26	11

Source: Economic Modeling Specialists, Inc.

Occupational Education Requirements

The trend for occupational growth shows that there will be growth in jobs across skill levels. Based on employment projections, Clarendon County is expected to see growth in requirements for the following specific levels of education and experience:

- Moderate-term on-the-job training
- Work experience in a related field
- Associate's degree



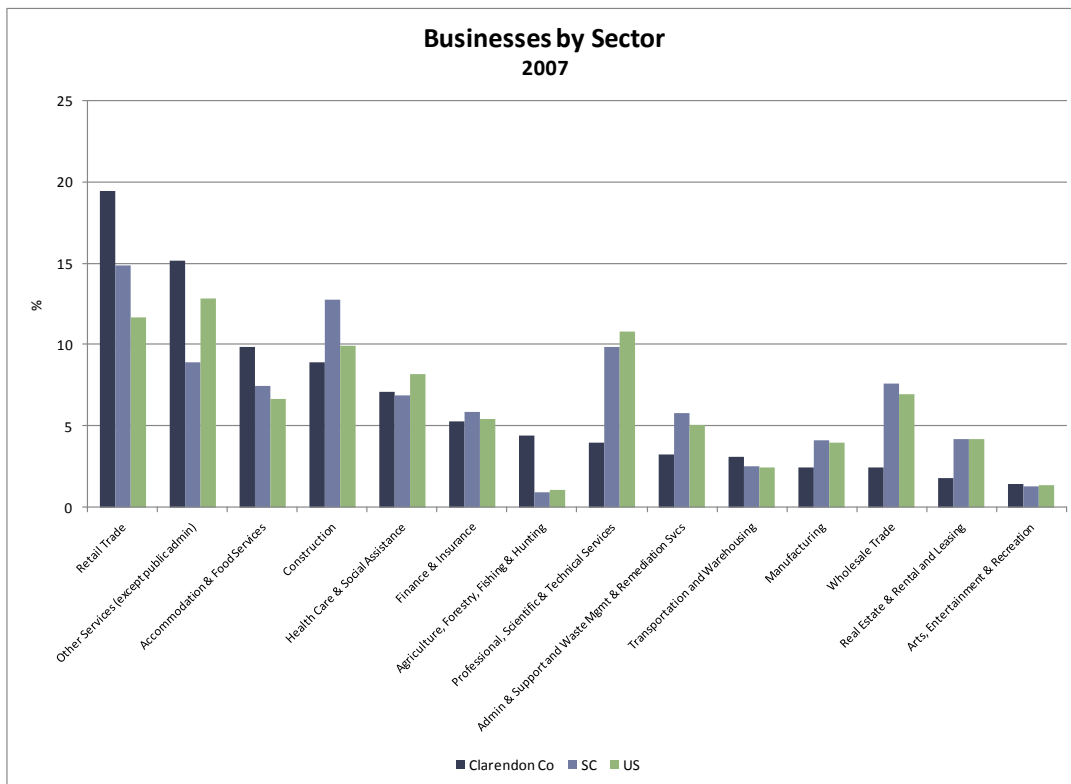
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Clarendon County had higher percentages of businesses than South Carolina or the nation in the following sectors:

- Retail trade
- Other services
- Accommodation and food services
- Agriculture and forestry
- Transportation and warehousing
- Arts, entertainment and recreation



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Clarendon County fell by 5% from 2002 to 2007, compared to a 2% drop for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, Clarendon County had higher growth in seven industries compared to South Carolina and the U.S. Below is a list of those seven industries along with their respective growth rates.

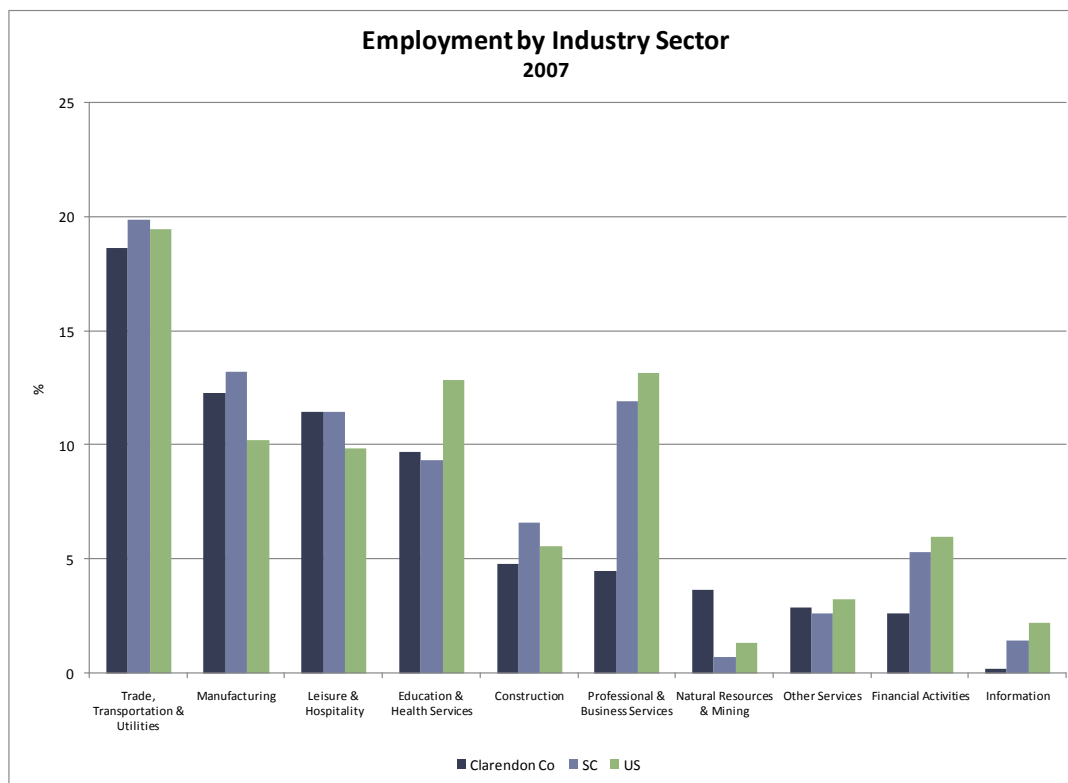
See **Appendix B** for information on all industries.

Industry	2002-2007 Growth (%)		
	Clarendon Co.	SC	US
Building material and garden equipment and supplies dealers	30.0	-8.8	0.9
General merchandise stores	42.9	17.5	13.3
Truck transportation	23.1	-5.1	5.4
Ambulatory health care services	30.4	7.4	13.3
Accommodation	46.7	-3.4	3.5
Personal and laundry services	8.3	-2.4	7.2
Private households	111.5	4.6	24.9

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Clarendon County has a much larger than average share of its jobs in the small natural resources and mining sector. Trade, transportation and utilities accounts for the largest portion of the county's jobs.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2002-2007 employment growth | Competitive effect ¹ |
| • 2002-2007 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2002-2007 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2002-2007 employment growth rate greater than 0% (the county lost jobs over the period)(Did the sector add jobs?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in the county?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$26,097 (2007 average for the county) (Does the sector pay wages greater than average for the county?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Clarendon. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Clarendon County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria and available data, there are no “six star” sectors in Clarendon County. The following are the “five star” sectors for the county:

- Building material and garden equipment and supplies dealers (growth projected to be below average)
- Ambulatory health care services (wages slightly below average)
- Private households (wages well below average)

Industry sectors that generate wealth from outside the area are referred to as the region’s base economy.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county compared to the US; based on 2007 data.*

Base economy sectors are important to an area's economic well-being. The sectors listed above serve the local population and do not bring wealth into the area. A sector which fits this base economy criteria, has above-average wages, has a high concentration in the area (as indicated by the location quotient), and is projected to grow is truck transportation.

Appendix C has information on all factors for all sectors for Clarendon County.

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Clarendon County's labor market. We hope that it will help in advancing the progress of Clarendon County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Clarendon Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Clarendon's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Clarendon and its community?*

Over and above pure economic considerations, what is important to the citizens of the Clarendon community? How does Clarendon want to be perceived? What quality of life issues affect Clarendon? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Clarendon County

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-3011	Administrative services managers	11	14	3	27	0.67	21.92	Degree plus work experience
11-3031	Financial managers	22	29	7	32	0.49	22.61	Degree plus work experience
11-3051	Industrial production managers	10	16	6	60	--	--	Work experience in a related field
11-9011	Farm, ranch, and other agricultural managers	63	61	-2	-3	2.69	5.86	Degree plus work experience
11-9012	Farmers and ranchers	312	298	-14	-4	2.69	5.85	Long-term on-the-job training
11-9021	Construction managers	68	98	30	44	1.36	18.21	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	34	43	9	26	1.68	50.68	Degree plus work experience
11-9051	Food service managers	26	33	7	27	0.86	15.58	Work experience in a related field
11-9081	Lodging managers	35	45	10	29	3.55	12.92	Work experience in a related field
11-9111	Medical and health services managers	14	20	6	43	0.68	22.00	Degree plus work experience
11-9141	Property, real estate, and community association managers	50	74	24	48	0.64	9.20	Bachelor's degree
11-9151	Social and community service managers	11	14	3	27	1.09	13.06	Bachelor's degree
11-9199	Managers, all other	92	115	23	25	0.86	26.68	Work experience in a related field
11-1011	Chief executives	77	99	22	29	1.02	23.26	Degree plus work experience
11-1021	General and operations managers	106	128	22	21	0.85	28.83	Degree plus work experience
11-1031	Legislators	21	25	4	19	5.04	9.08	Degree plus work experience
13-1023	Purchasing agents, except wholesale, retail, and farm products	10	14	4	40	--	--	Work experience in a related field

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
13-1071	Employment, recruitment, and placement specialists	11	14	3	27	0.78	13.71	Bachelor's degree
13-1111	Management analysts	32	47	15	47	0.47	12.21	Degree plus work experience
13-1199	Business operation specialists, all other	17	22	5	29	0.23	17.47	Bachelor's degree
13-2011	Accountants and auditors	56	78	22	39	0.53	12.12	Bachelor's degree
13-2021	Appraisers and assessors of real estate	19	27	8	42	0.65	11.20	Postsecondary vocational award
13-2052	Personal financial advisors	26	37	11	42	0.53	6.39	Bachelor's degree
13-2072	Loan officers	10	12	2	20	--	--	Bachelor's degree
17-2051	Civil engineers	10	13	3	30	--	--	Bachelor's degree
21-1011	Substance abuse and behavioral disorder counselors	14	20	6	43	2.13	18.41	Master's degree
21-1012	Educational, vocational, and school counselors	31	39	8	26	1.78	19.35	Master's degree
21-1015	Rehabilitation counselors	26	33	7	27	2.57	12.74	Master's degree
21-1021	Child, family, and school social workers	46	55	9	20	2.25	14.53	Bachelor's degree
21-1023	Mental health and substance abuse social workers	35	53	18	51	3.80	11.78	Master's degree
21-1092	Probation officers and correctional treatment specialists	13	17	4	31	2.14	19.27	Bachelor's degree
21-1093	Social and human service assistants	59	78	19	32	2.45	10.07	Moderate-term on-the-job training
21-2011	Clergy	22	26	4	18	1.31	6.96	Master's degree
23-1011	Lawyers	37	45	8	22	0.63	49.74	First professional degree
23-1023	Judges, magistrate judges, and magistrates	14	17	3	21	8.05	22.53	Degree plus work experience
25-1099	Postsecondary teachers	52	70	18	35	0.50	40.09	Doctoral degree
25-2011	Preschool teachers, except special education	42	44	2	5	1.20	11.16	Postsecondary vocational award
25-2012	Kindergarten teachers, except special education	56	73	17	30	4.37	28.58	Bachelor's degree
25-2021	Elementary school teachers, except special education	229	288	59	26	2.05	25.68	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	85	103	18	21	1.75	23.95	Bachelor's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
25-2031	Secondary school teachers, except special and vocational education	104	122	18	17	1.40	25.83	Bachelor's degree
25-2032	Vocational education teachers, secondary school	12	13	1	8	1.67	27.35	Degree plus work experience
25-2041	Special education teachers, preschool, kindergarten, and elementary school	27	36	9	33	1.75	26.77	Bachelor's degree
25-2042	Special education teachers, middle school	13	16	3	23	1.75	25.57	Bachelor's degree
25-2043	Special education teachers, secondary school	11	13	2	18	1.12	24.88	Bachelor's degree
25-3021	Self-enrichment education teachers	11	14	3	27	0.61	10.77	Work experience in a related field
25-3099	Teachers and instructors, all other	31	37	6	19	0.67	15.92	Bachelor's degree
25-4021	Librarians	14	17	3	21	1.27	24.67	Master's degree
25-4031	Library technicians	10	12	2	20	--	--	Postsecondary vocational award
25-9041	Teacher assistants	193	228	35	18	2.01	9.31	Short-term on-the-job training
27-2042	Musicians and singers	10	12	2	20	--	--	Long-term on-the-job training
27-3043	Writers and authors	10	14	4	40	0.38	6.55	Bachelor's degree
27-4021	Photographers	19	10	-9	-47	0.37	8.60	Long-term on-the-job training
29-1051	Pharmacists	13	18	5	38	0.78	53.38	First professional degree
29-1069	Physicians and surgeons	36	45	9	25	0.64	65.25	First professional degree
29-1111	Registered nurses	89	127	38	43	0.53	20.73	Associate's degree
29-1127	Speech-language pathologists	17	21	4	24	1.93	18.96	Master's degree
29-2012	Medical and clinical laboratory technicians	17	24	7	41	1.70	10.06	Associate's degree
29-2034	Radiologic technologists and technicians	11	16	5	45	0.87	18.49	Associate's degree
29-2041	Emergency medical technicians and paramedics	15	20	5	33	1.13	11.89	Postsecondary vocational award
29-2052	Pharmacy technicians	20	33	13	65	1.04	7.90	Moderate-term on-the-job training
29-2061	Licensed practical and licensed vocational nurses	62	85	23	37	1.24	13.35	Postsecondary vocational award

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
31-1011	Home health aides	117	194	77	66	2.02	5.85	Short-term on-the-job training
31-1012	Nursing aides, orderlies, and attendants	55	76	21	38	0.55	7.93	Postsecondary vocational award
31-1013	Psychiatric aides	14	22	8	57	1.62	6.27	Short-term on-the-job training
31-9091	Dental assistants	10	11	1	10	0.53	19.27	Moderate-term on-the-job training
31-9092	Medical assistants	15	25	10	67	0.53	7.73	Moderate-term on-the-job training
33-2011	Fire fighters	16	21	5	31	0.81	19.35	Long-term on-the-job training
33-3012	Correctional officers and jailers	191	247	56	29	6.64	13.77	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	86	111	25	29	1.96	15.38	Long-term on-the-job training
33-9032	Security guards	26	32	6	23	0.37	6.88	Short-term on-the-job training
35-1011	Chefs and head cooks	10	11	1	10	--	--	Work experience in a related field
35-1012	First-line supervisors/managers of food preparation and serving workers	75	81	6	8	1.27	10.29	Work experience in a related field
35-2011	Cooks, fast food	150	156	6	4	3.49	6.12	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	55	61	6	11	1.96	6.66	Moderate-term on-the-job training
35-2014	Cooks, restaurant	37	40	3	8	0.64	7.67	Long-term on-the-job training
35-2015	Cooks, short order	11	11	0	0	0.76	7.46	Short-term on-the-job training
35-2021	Food preparation workers	45	56	11	24	0.73	6.66	Short-term on-the-job training
35-3011	Bartenders	13	14	1	8	0.37	6.80	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
35-3021	Combined food preparation and serving workers, including fast food	208	240	32	15	1.22	6.11	Short-term on-the-job training
35-3022	Counter attendants, cafeteria, food concession, and coffee shop	12	15	3	25	0.34	6.51	Short-term on-the-job training
35-3031	Waiters and waitresses	132	143	11	8	0.82	7.28	Short-term on-the-job training
35-3041	Food servers, nonrestaurant	20	22	2	10	1.60	5.85	Short-term on-the-job training
35-9021	Dishwashers	20	21	1	5	0.56	6.29	Short-term on-the-job training
35-9031	Hosts and hostesses, restaurant, lounge, and coffee shop	11	12	1	9	0.46	7.97	Short-term on-the-job training
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	35	47	12	34	1.36	7.78	Work experience in a related field
37-1012	First-line supervisors/managers of landscaping, lawn service, and groundskeeping workers	23	32	9	39	2.22	8.56	Work experience in a related field
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	126	143	17	13	0.80	7.67	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	266	349	83	31	2.14	5.85	Short-term on-the-job training
37-2019	Building cleaning workers, all other	53	77	24	45	1.56	5.85	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	104	137	33	32	1.46	7.86	Short-term on-the-job training
37-3012	Pesticide handlers, sprayers, and applicators, vegetation	23	32	9	39	3.22	6.16	Moderate-term on-the-job training
37-3013	Tree trimmers and pruners	21	30	9	43	2.92	6.12	Short-term on-the-job training
37-3019	Grounds maintenance workers, all other	26	36	10	38	3.79	6.04	Short-term on-the-job training
39-1021	First-line supervisors/managers of personal service workers	18	18	0	0	1.11	12.38	Work experience in a related field
39-2011	Animal trainers	16	16	0	0	2.54	8.34	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
39-2021	Nonfarm animal caretakers	26	20	-6	-23	1.02	8.98	Short-term on-the-job training
39-3091	Amusement and recreation attendants	15	20	5	33	0.90	5.90	Short-term on-the-job training
39-5012	Hairdressers, hairstylists, and cosmetologists	26	14	-12	-46	0.68	7.55	Postsecondary vocational award
39-9011	Child care workers	148	196	48	32	1.33	6.02	Short-term on-the-job training
39-9021	Personal and home care aides	149	238	89	60	2.53	7.29	Short-term on-the-job training
39-9031	Fitness trainers and aerobics instructors	11	14	3	27	0.62	8.90	Postsecondary vocational award
39-9032	Recreation workers	14	16	2	14	0.60	11.46	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	276	334	58	21	1.81	11.63	Work experience in a related field
41-1012	First-line supervisors/managers of non-retail sales workers	46	57	11	24	0.73	14.69	Work experience in a related field
41-2011	Cashiers, except gaming	486	483	-3	-1	2.00	6.70	Short-term on-the-job training
41-2021	Counter and rental clerks	29	35	6	21	0.88	7.25	Short-term on-the-job training
41-2022	Parts salespersons	35	36	1	3	2.13	12.96	Moderate-term on-the-job training
41-2031	Retail salespersons	248	286	38	15	0.73	8.19	Short-term on-the-job training
41-3021	Insurance sales agents	47	51	4	9	0.95	8.44	Bachelor's degree
41-3031	Securities, commodities, and financial services sales agents	17	25	8	47	0.37	6.29	Bachelor's degree
41-3099	Sales representatives, services, all other	15	21	6	40	0.32	8.15	Moderate-term on-the-job training
41-4011	Sales representatives, wholesale and manufacturing, technical and scientific products	13	17	4	31	0.37	33.16	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	58	85	27	47	0.52	26.53	Moderate-term on-the-job training
41-9021	Real estate brokers	79	118	39	49	0.69	8.73	Work experience in a related field
41-9022	Real estate sales agents	90	132	42	47	0.73	8.72	Postsecondary vocational award
41-9091	Door-to-door sales workers, news and street vendors, and related workers	55	60	5	9	0.72	5.86	Short-term on-the-job training
41-9099	Sales and related workers, all other	13	16	3	23	0.53	6.43	Moderate-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	83	101	18	22	0.80	16.38	Work experience in a related field
43-3011	Bill and account collectors	11	15	4	36	0.38	10.57	Short-term on-the-job training
43-3021	Billing and posting clerks and machine operators	33	42	9	27	0.88	10.42	Moderate-term on-the-job training
43-3031	Bookkeeping, accounting, and auditing clerks	131	167	36	27	0.85	10.84	Moderate-term on-the-job training
43-3051	Payroll and timekeeping clerks	13	16	3	23	0.90	12.60	Moderate-term on-the-job training
43-3071	Tellers	34	38	4	12	0.82	11.65	Short-term on-the-job training
43-4051	Customer service representatives	58	85	27	47	0.38	11.28	Moderate-term on-the-job training
43-4081	Hotel, motel, and resort desk clerks	49	54	5	10	3.25	6.85	Short-term on-the-job training
43-4111	Interviewers, except eligibility and loan	10	12	2	20	--	--	Short-term on-the-job training
43-4171	Receptionists and information clerks	42	55	13	31	0.51	8.46	Short-term on-the-job training
43-5031	Police, fire, and ambulance dispatchers	15	19	4	27	2.12	10.27	Moderate-term on-the-job training
43-5032	Dispatchers, except police, fire, and ambulance	17	20	3	18	1.26	11.46	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-5041	Meter readers, utilities	10	12	2	20	3.24	11.78	Short-term on-the-job training
43-5052	Postal service mail carriers	29	34	5	17	1.28	20.16	Short-term on-the-job training
43-5061	Production, planning, and expediting clerks	11	17	6	55	0.52	14.26	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	26	38	12	46	0.49	11.28	Short-term on-the-job training
43-5081	Stock clerks and order fillers	97	106	9	9	0.81	7.49	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	57	73	16	28	0.50	14.17	Moderate-term on-the-job training
43-6012	Legal secretaries	23	28	5	22	0.92	20.60	Postsecondary vocational award
43-6013	Medical secretaries	32	43	11	34	0.96	9.27	Postsecondary vocational award
43-6014	Secretaries, except legal, medical, and executive	157	179	22	14	1.13	12.00	Moderate-term on-the-job training
43-9021	Data entry keyers	10	10	0	0	0.42	9.25	Moderate-term on-the-job training
43-9061	Office clerks, general	193	247	54	28	0.86	9.66	Short-term on-the-job training
45-1099	Supervisors, farming, fishing, and forestry workers	15	18	3	20	4.99	21.43	Work experience in a related field
45-2091	Agricultural equipment operators	27	36	9	33	13.49	9.20	Moderate-term on-the-job training
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	73	94	21	29	3.52	8.37	Short-term on-the-job training
45-3011	Fishers and related fishing workers	17	12	-5	-29	2.48	5.85	Moderate-term on-the-job training
45-4021	Fallers	13	16	3	23	8.61	17.79	Moderate-term on-the-job training
45-4022	Logging equipment operators	46	63	17	37	15.71	13.97	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
47-1011	First-line supervisors/managers of construction trades and extraction workers	86	119	33	38	1.17	17.39	Work experience in a related field
47-2021	Brickmasons and blockmasons	10	13	3	30	--	--	Long-term on-the-job training
47-2031	Carpenters	157	211	54	34	1.32	15.11	Long-term on-the-job training
47-2051	Cement masons and concrete finishers	10	12	2	20	--	--	Moderate-term on-the-job training
47-2061	Construction laborers	81	110	29	36	0.82	12.19	Moderate-term on-the-job training
47-2073	Operating engineers and other construction equipment operators	52	65	13	25	1.77	12.82	Moderate-term on-the-job training
47-2111	Electricians	36	42	6	17	0.69	15.07	Long-term on-the-job training
47-2141	Painters, construction and maintenance	37	52	15	41	0.95	15.32	Moderate-term on-the-job training
47-2151	Pipelayers	22	32	10	45	2.85	13.59	Moderate-term on-the-job training
47-2152	Plumbers, pipefitters, and steamfitters	34	50	16	47	0.98	16.81	Long-term on-the-job training
47-3012	Helpers, carpenters	16	19	3	19	2.10	12.08	Short-term on-the-job training
47-4011	Construction and building inspectors	10	13	3	30	1.13	13.89	Work experience in a related field
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	34	41	7	21	1.04	19.90	Work experience in a related field
49-3021	Automotive body and related repairers	20	22	2	10	1.53	9.74	Long-term on-the-job training
49-3023	Automotive service technicians and mechanics	43	48	5	12	0.74	13.16	Postsecondary vocational award
49-3031	Bus and truck mechanics and diesel engine specialists	26	31	5	19	1.35	14.74	Postsecondary vocational award
49-3041	Farm equipment mechanics	25	36	11	44	10.38	16.21	Postsecondary vocational award

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
49-9021	Heating, air conditioning, and refrigeration mechanics and installers	22	31	9	41	0.95	15.83	Long-term on-the-job training
49-9041	Industrial machinery mechanics	16	22	6	38	0.90	16.86	Long-term on-the-job training
49-9042	Maintenance and repair workers, general	159	212	53	33	1.64	11.48	Moderate-term on-the-job training
49-9098	Helpers--Installation, maintenance, and repair workers	32	42	10	31	2.85	12.45	Short-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	64	102	38	59	1.31	22.26	Work experience in a related field
51-2092	Team assemblers	227	380	153	67	2.63	11.07	Moderate-term on-the-job training
51-2099	Assemblers and fabricators, all other	13	20	7	54	0.63	17.77	Moderate-term on-the-job training
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	26	43	17	65	1.41	11.64	Moderate-term on-the-job training
51-4041	Machinists	10	17	7	70	--	--	Long-term on-the-job training
51-4072	Molding, coremaking, and casting machine setters, operators, and tenders, metal and plastic	118	204	86	73	11.03	9.85	Moderate-term on-the-job training
51-4121	Welders, cutters, solderers, and brazers	23	37	14	61	0.85	12.77	Long-term on-the-job training
51-6011	Laundry and dry-cleaning workers	21	24	3	14	1.15	5.85	Moderate-term on-the-job training
51-6031	Sewing machine operators	15	39	24	160	0.89	14.44	Moderate-term on-the-job training
51-7011	Cabinetmakers and bench carpenters	16	18	2	13	1.59	11.41	Long-term on-the-job training
51-7041	Sawing machine setters, operators, and tenders, wood	16	19	3	19	3.52	34.74	Moderate-term on-the-job training
51-7042	Woodworking machine setters, operators, and tenders, except sawing	12	14	2	17	1.77	11.21	Moderate-term on-the-job training
51-8031	Water and liquid waste treatment plant and system operators	27	36	9	33	3.73	19.79	Long-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-9011	Chemical equipment operators and tenders	18	19	1	6	5.06	13.27	Moderate-term on-the-job training
51-9041	Extruding, forming, pressing, and compacting machine setters, operators, and tenders	12	18	6	50	2.12	17.03	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	38	57	19	50	1.11	11.08	Moderate-term on-the-job training
51-9111	Packaging and filling machine operators and tenders	26	38	12	46	0.98	8.88	Short-term on-the-job training
51-9198	Helpers--Production workers	58	88	30	52	1.56	9.43	Short-term on-the-job training
51-9199	Production workers, all other	30	48	18	60	1.48	13.08	Moderate-term on-the-job training
53-1021	First-line supervisors/managers of helpers, laborers, and material movers, hand	10	15	5	50	0.82	16.84	Work experience in a related field
53-1031	First-line supervisors/managers of transportation and material-moving machine and vehicle operators	13	16	3	23	0.81	22.97	Work experience in a related field
53-3022	Bus drivers, school	49	59	10	20	1.47	8.06	Short-term on-the-job training
53-3031	Driver/sales workers	73	100	27	37	1.68	7.57	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	195	248	53	27	1.48	11.93	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	139	183	44	32	1.71	8.07	Short-term on-the-job training
53-3041	Taxi drivers and chauffeurs	12	14	2	17	0.54	9.32	Short-term on-the-job training
53-7032	Excavating and loading machine and dragline operators	12	16	4	33	2.39	11.44	Moderate-term on-the-job training
53-7051	Industrial truck and tractor operators	46	50	4	9	1.04	10.42	Short-term on-the-job training
53-7061	Cleaners of vehicles and equipment	32	41	9	28	1.28	7.63	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	200	251	51	26	1.19	11.23	Short-term on-the-job training


SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
53-7064	Packers and packagers, hand	66	80	14	21	1.14	6.51	Short-term on-the-job training
		11,868	15,003	3,135	26		12.77	

at least 1.25 greater than \$12.77

Source: EMSI

Appendix B: Businesses by 3-Digit NAICS Codes

Clarendon County								
Industry	NAICS Code	Change						
		2002	2007	Average Size	#	%	SC % change	US % change
Crop Production	111	19	13	9	-6	-31.6	-17.6	-9.3
Animal Production	112	3	2		-1	-33.3	-19.2	5.0
Forestry and Logging	113	6	4		-2	-33.3	-26.0	-15.2
Support Activities for Agriculture and Forestry	115	8	8	6	0	0.0	-13.0	1.8
Utilities	221	4	2		-2	-50.0	-8.8	-0.9
Construction of Buildings	236	11	12	6	1	9.1	-0.4	15.4
Heavy and Civil Engineering Construction	237	9	8	6	-1	-11.1	-2.0	-2.3
Specialty Trade Contractors	238	36	34	8	-2	-5.6	-6.4	12.9
Wood Product Manufacturing	321	6	5	29	-1	-16.7	-6.4	-5.7
Merchant Wholesalers, Durable Goods	423	7	7	8	0	0.0	0.6	-5.6
Motor Vehicle and Parts Dealers	441	16	16	8	0	0.0	-11.6	2.2
Furniture and Home Furnishings Stores	442	5	4	4	-1	-20.0	-11.3	3.8
Building Material and Garden Equipment and Supplies Dealers	444	10	13	8	3	30.0	-8.8	0.9
Food and Beverage Stores	445	21	18	17	-3	-14.3	-18.2	-0.5
Health and Personal Care Stores	446	9	6	7	-3	-33.3	9.1	10.2
Gasoline Stations	447	43	25	9	-18	-41.9	-2.8	-1.9
Clothing and Clothing Accessories Stores	448	8	7	6	-1	-12.5	-5.3	4.6
Sporting Goods, Hobby, Book, and Music Stores	451	4	4	1	0	0.0	-11.1	-6.5
General Merchandise Stores	452	7	10	33	3	42.9	17.5	13.3
Miscellaneous Store Retailers	453	16	11	2	-5	-31.3	-23.9	-8.6
Truck Transportation	484	13	16	6	3	23.1	-5.1	5.4
Credit Intermediation and Related Activities	522	20	19	6	-1	-5.0	12.2	23.8
Real Estate	531	10	8	5	-2	-20.0	18.8	23.8
Rental and Leasing Services	532	5	3	3	-2	-40.0	-8.3	1.7
Professional, Scientific, and Technical Services	541	27	24		-3	-11.1	2.1	14.3
Administrative and Support Services	561	18	20	10	2	11.1	2.2	13.0
Educational Services	611	3	2		-1	-33.3	14.1	23.7
Ambulatory Health Care Services	621	23	30	13	7	30.4	7.4	13.3
Nursing and Residential Care Facilities	623	6	5	44	-1	-16.7	0.4	8.8
Social Assistance	624	15	8		-7	-46.7	-5.0	29.4
Amusement, Gambling, and Recreation Industries	713	12	9	10	-3	-25.0	-14.4	12.9
Accommodation	721	15	22	9	7	46.7	-3.4	3.5
Food Services and Drinking Places	722	38	38	16	0	0.0	-0.2	12.2
Repair and Maintenance	811	22	17	5	-5	-22.7	-18.3	-0.4
Personal and Laundry Services	812	12	13	3	1	8.3	-2.4	7.2
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	11	8	8	-3	-27.3	-2.0	3.3
Private Households	814	26	55	1	29	111.5	4.6	24.9

 growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Clarendon County Employment by Industry Sector

Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Total		7,873	7,850	-23	-0.3			26,097	26%

<i>6 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
NONE									

<i>5 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Building Material and Garden Equipment and Supplies Dealers	444	61	99	38	62	1.55	31	26,265	BA
Ambulatory Health Care Services	621	205	386	181	88	1.45	144	26,087	AA
Private Households	814	27	55	28	104	2.05	22	9,656	A

<i>4 star sectors</i>									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Support Activities for Agriculture and Forestry	115	35	44	9	26	2.72	6	28,724	BA
Construction of Buildings	236	42	66	24	57	0.77	19	29,337	A
Specialty Trade Contractors	238	187	262	75	40	1.12	48	24,558	A

4 star sectors		Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%				
Food and Beverage Stores	445	294	314	20	7	2.26	22	11,650	A
General Merchandise Stores	452	159	326	167	105	2.21	155	17,899	BA
Truck Transportation	484	91	98	7	8	1.39	0	33,927	A
Amusement, Gambling, and Recreation Industries	713	62	91	29	47	1.31	23	13,537	BA
Accommodation	721	141	194	53	38	2.14	46	10,502	BA

3 star or fewer sectors		Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%				
Heavy and Civil Engineering Construction	237	44	48	4	9	1.00	1	21,127	A
Real Estate	531	27	38	11	41	0.52	8	17,500	AA
Food Services and Drinking Places	722	544	615	71	13	1.32	0	9,978	BA
Repair and Maintenance	811	70	77	7	10	1.26	6	24,978	BA
Motor Vehicle and Parts Dealers	441	135	135	0	0	1.45	-2	33,327	BA
Merchant Wholesalers, Durable Goods	423	57	53	-4	-7	0.35	-6	32,147	AA
Health and Personal Care Stores	446	46	42	-4	-9	0.87	-7	49,679	A
Clothing and Clothing Accessories Stores	448	29	42	13	45	0.57	9	15,556	BA
Sporting Goods, Hobby, Book, and Music Stores	451	3	4	1	33	0.12	1	11,697	BA
Nursing and Residential Care Facilities	623	247	222	-25	-10	1.55	-44	21,082	A
Crop Production	111	145	113	-32	-22	4.30	-28	23,724	
Wood Product Manufacturing	321	161	143	-18	-11	5.70	-6	24,733	BA
Gasoline Stations	447	387	213	-174	-45	5.07	-159	13,778	BA
Miscellaneous Store Retailers	453	53	25	-28	-53	0.59	-23	18,797	A
Credit Intermediation and Related Activities	522	130	121	-9	-7	0.86	-19	29,365	BA
Administrative and Support Services	561	278	203	-75	-27	0.52	-104	17,936	A

<i>3 star or fewer sectors</i>		Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%				
Furniture and Home Furnishings Stores	442	20	14	-6	-30	0.50	-7	13,835	BA
Rental and Leasing Services	532	12	10	-2	-17	0.32	-2	16,621	BA
Personal and Laundry Services	812	64	36	-28	-44	0.56	-31	18,237	D
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	96	62	-34	-35	0.95	-37	24,256	BA

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2002-2007 employment growth, 2002-2007 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2002-2007 employment growth of 25 or more, 2002-2007 employment growth rate greater than 0% (since total employment declined in the county), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$26,097 (2007 average for all jobs in the county), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county; based on 2007 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



South Carolina
Department of Commerce
1201 Main Street, Suite 1600
Columbia, SC 29201

(800) 868-7232
(803) 737-0400
www.sccommerce.com